Cataloguing Templates

This lesson demonstrates creating, using, exporting and importing item record templates for cataloguing. Use of templates enhances item creation and helps ensure consistency in record format in the database.

Creating Item Templates

1. Retrieve a record in the catalogue as described in **Searching the Database for Cataloguers.**
2. Select *Actions for this Record > Holdings Maintenance*.
3. Select an item record in list and click *Actions for Selected Rows > Edit Item Attributes*.
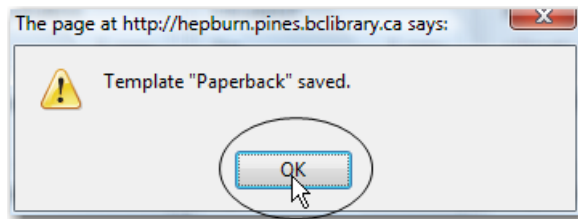4. The Copy Editor opens. Select required template attributes by moving through fields and clicking *Apply* for every edit, and click *Save* .
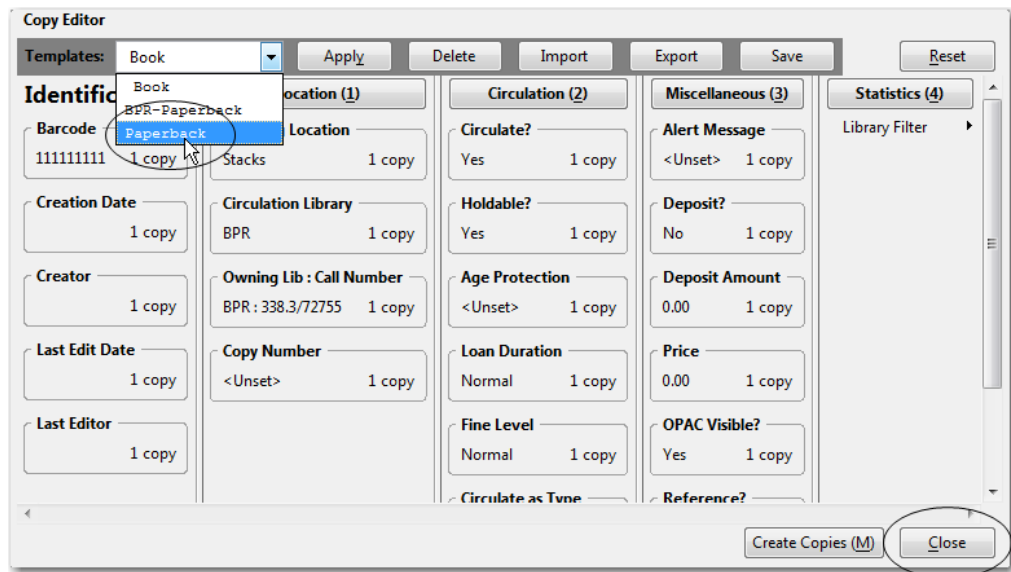
5. Enter a template name at prompt and click *OK*.
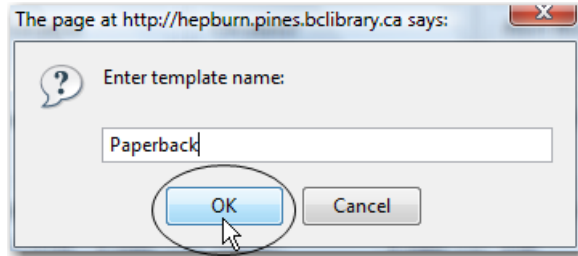
6. Template is saved. Click *OK*.

7. You can now choose your new template from drop down menu, or click *Close* to exit the Copy Editor.
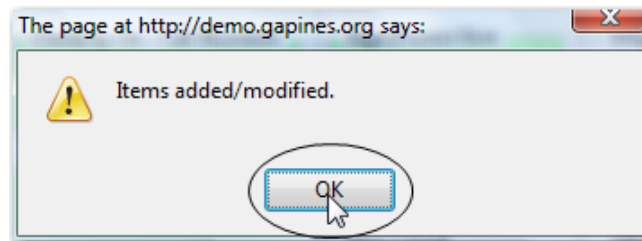
Using Item Templates

You can now use the templates when you manually add items to the database.

1. Navigate to appropriate volume record in cataloguing and select *Actions for this Row> Add Items*.
2. Enter number of copies and barcode and click *Edit then Create* to open Copy Editor.
3. Choose the appropriate template from the drop down menu and click *Apply*.

4. Make any necessary edits, remembering to click *Apply* for each edit, and click *Create Copies (M)*.

5. Item is created. Click *OK*.

Exporting Item Templates

Templates are saved and viewable by the login that created them. To share templates with other staff, you will need to export them.

1. In the top left hand corner of the Copy Editor, click on *Export*. This will export all of your templates.
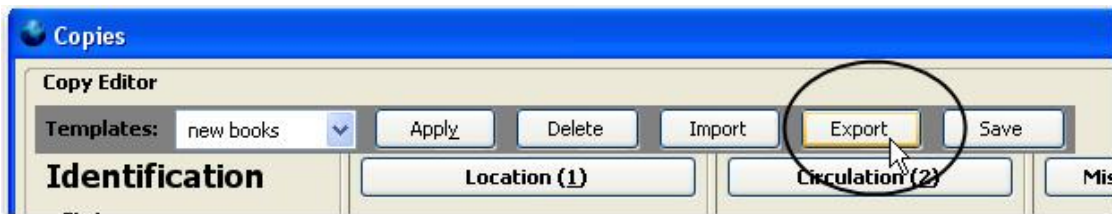
2. Select where you will save the template on your computer, name the file and click *Save*. You could email the file from your computer, or save it to a flashdrive to move it to a different computer.
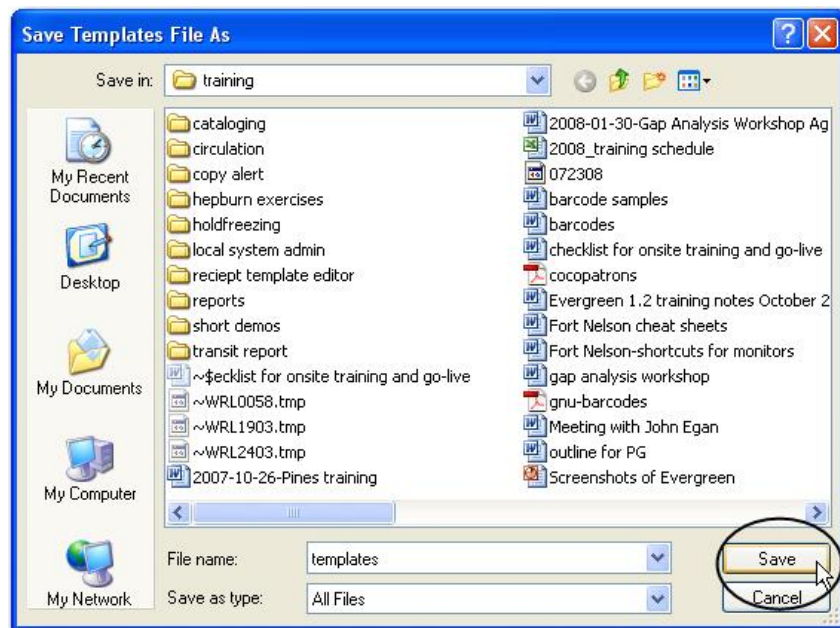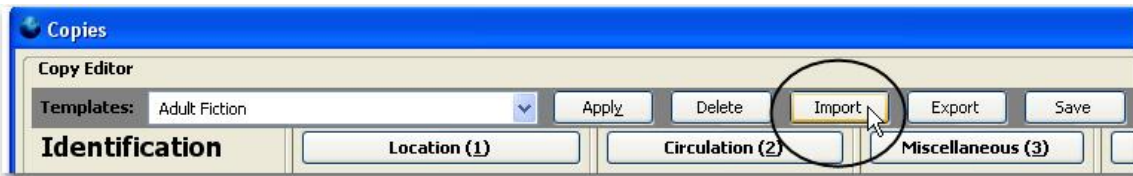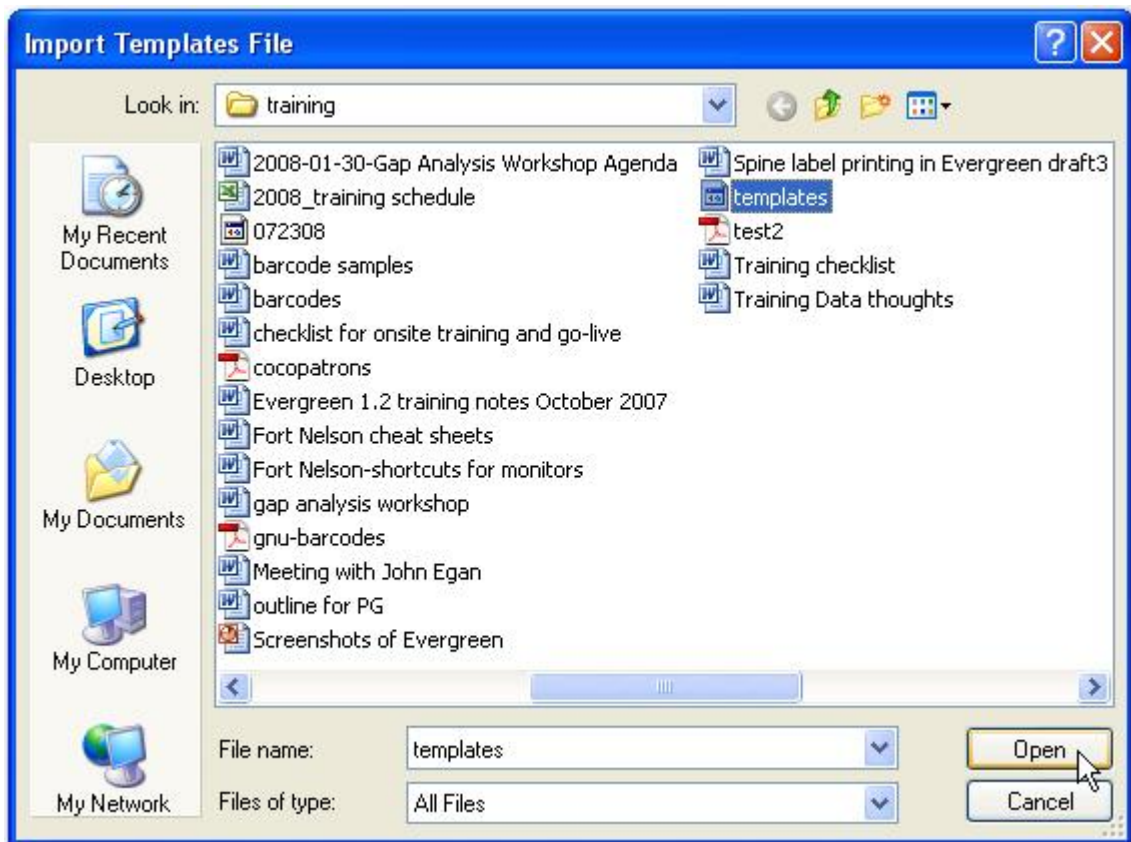

3. Click *OK*.

Importing Templates

1. In the top left hand corner of the Copy Editor, click on *Import*.

2. Navigate to where the file is located, select the file and click *Open*.

3. Click *OK*.